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MR. COFFEY -

PEGGY - prepare suspense

REGISTRY

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RETIREMENT PLANNING SEMINAR

Monday, 25 March 1968

10:00 - 10:15      Welcome: Director of Personnel

10:15 - 10:45      Introduction: Chief, Retirement Counseling  
and Placement Staff

10:45 - 11:45      Disengagement and Meaning of Retirement:  
Dr. Leonard Nadler, Director, Educational  
Projects, Leadership Resources, Inc.

Tuesday, 26 March 1968

10:00 - 11:00      Health: Director of Medical Services

11:00 - 12:00      Housing: Mr. E. Everett Ashley, Director,  
Statistical Reports and Analysis Staff, Office  
of Deputy Under Secretary, Department of  
Housing and Urban Development

Wednesday - 27 March 1968

10:00 - 10:15      CIA Retirement System: Chief, Benefits and  
Services Division

10:15 - 11:00      Civil Service Retirement and Financial Aspects  
of Retirement: Lawrence D. Davis, Training  
Officer, Bureau of Retirement and Insurance,  
Civil Service Commission

11:00 - 12:00      Social Security Benefits: William Spates, Manager,  
Washington Office, Social Security Administration

Thursday, 28 March 1968

10:00 - 11:00      Tax Aspects of Retirement: Speaker from Internal  
Revenue Service, U. S. Department of Treasury  
(IRS has not identified speaker as yet.)

11:00 - 12:00      Banking: Karl F. Heinzman, Trust Officer, American  
Security and Trust Company

Friday, 29 March 1968

10:00 - 11:00      Part-Time Employment: Robert B. Brown, Chief, Staff  
Services Division, U. S. Employment Service

11:00 - 12:00      Second Careers: Frederic A. Wyatt, Management  
Consultant, Author and Speaker

(X)

WELCOME ADDRESS AND INTRODUCTION

TOPICS TO BE COVERED:

1. Agency policy on retirement
2. Objectives of the retirement program
3. Need for a retirement program
4. Need for the retirement planning seminars
5. Individual counseling available for those who may need it
6. Stress the need to bring in the spouse on all retirement planning

TOPICS TO BE COVERED BY SEMINAR SPEAKERS ARE LISTED  
ON THE FOLLOWING TWO PAGES

RETIREMENT PLANNING SEMINAR

CONTENTS

Disengagement and Meaning of Retirement

1. Begin now on how to retire.
2. Successful and happy retirement doesn't just happen. It requires planning.
3. Attitudes associated with retirement and some of the factors such as, group activities and associations, plus ways to go about getting supplementary income from other work.
4. Abilities and interest which might be turned to good account for pay or pleasure.

Health

1. Importance of exercise and diet.
2. Psychological aspects of retiring -- avoid boredom.
3. More freedom of movement.
4. Biological changes and diseases most common.
5. Importance of physical examinations.
6. Personal stock of yourself. Not so much where you are but where you are going.

Housing

1. Decision to make - move or stay where you are.
2. Various housing plans such as retirement communities, etc. and choices on where to live.
3. Importance of visiting various areas and taking a good hard look.
4. Factors to consider such as economic and climatic.

Organization/Civil Service Retirement Benefits and Financial Aspects

1. Benefits of the two systems.
2. Federal Employees' Group Life Insurance, medical and hospitalization insurance after retirement.
3. Importance of retirement budgets.
4. Financial aspect of retirement.

### Social Security

1. Social Security benefits for which you and your family may qualify including a discussion on medicare vs. group hospitalization.
2. Social Security credits including free credits for military service.
3. Family payments.
4. Kinds of work covered.
5. Events that stop payments and benefits paid to people who are still working.

### Legal/Tax Aspects of Retirement and Banking

1. Wills and estate planning.
2. Title to property and kinds of ownership including rights derived from ownership.
3. Laws of descent and distribution.
4. Administration of estates.
5. Importance of legal check list.
6. Gifts, trusts and safe deposit boxes.
7. Special emphasis to above items given to those who may continue to reside in Maryland, Virginia and the District of Columbia.

### Part-time Employment and Second Careers

1. Preparation of resumes and when to submit a resume.
2. Operating a small business vs. a part-time job.
3. Things to consider in choosing a retirement job that will bring you maximum satisfaction.
4. Things to do and things not to do in seeking post employment.

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# Headquarters EMPLOYEE BULLETIN

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Retirement Counseling Series #2

## SPECIAL RETIREMENT INFORMATION SEMINARS

1. Special Retirement Information Seminars are being arranged to help employees who are nearing retirement. The purpose of these seminars is to provide constructive information to enable Agency employees to plan an organized retirement and to approach it confidently. Two seminars will be presented in calendar year 1968. The first, in March, will be primarily for employees scheduled to retire between 1 April and 31 December 1968; the second, for employees scheduled to retire between 1 January and 31 December 1969, will be held in November. Personnel who are planning to retire within these periods will be asked to participate in these seminars. Other employees who are interested in starting to plan for their retirement after 1969 are cordially invited to attend all or a part of the sessions.

2. The first seminar, consisting of five two-hour sessions, will begin on 25 March 1968. All sessions will be held in the auditorium, Headquarters Building. The schedule and subjects are listed below:

### SESSION I

Monday, 25 March  
10 a.m. to 12 noon  
Disengagement and the Meaning  
of Retirement

### SESSION II

Tuesday, 26 March  
10 a.m. to 12 noon  
Health and Housing

### SESSION III

Wednesday, 27 March  
2 - 4 p.m.  
CIA and Civil Service  
Retirement - Financial Aspects -  
Social Security

### SESSION IV

Thursday, 28 March  
10 a.m. to 12 noon  
Legal and Tax Aspects of  
Retirement - Banking

### SESSION V

Friday, 29 March  
10 a.m. to 12 noon  
Part-time Employment and  
Second Careers

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3. Some outside specialists will participate in this seminar. A question-and-answer period will follow each lecture to give employees opportunity to discuss points of particular interest.

4. Individuals, other than the 1968 retirees, desiring to attend the March seminar are asked to get in touch with the Retirement Counseling and Placement Staff, extension  no later than Wednesday, 20 March 1968.

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5. The exact date of the November seminar for employees retiring in calendar year 1969 will be announced by a subsequent bulletin. The schedule and subject matter will be essentially the same as in the March seminar.

APPROVAL TO PUBLISH:

(signed) John W. Coffey

*JW* R. L. BANNERMAN  
Deputy Director  
for Support

13 FEB 1968

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